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**UNITED STATES DISTRICT COURT**

## **WESTERN DISTRICT OF WASHINGTON**

TOUCHPOINT COMMUNICATIONS,  
LLC, an Oregon limited liability company,

Case No. 3:15-cv-05240-JRC

## **JOINT STIPULATED PROTECTIVE ORDER**

DENTALFONE, LLC a Florida limited  
liability company

Defendant.

## **1. PURPOSES AND LIMITATIONS**

Discovery in this action is likely to involve production of confidential, proprietary, and/or private information for which special protection may be warranted. Accordingly, the parties hereby stipulate to and petition the court to enter the following Stipulated Protective Order. The

1 parties acknowledge that this agreement is consistent with LCR 26(c). This does not confer  
2 blanket protection on all disclosures or responses to discovery, the protection it affords from  
3 public disclosure and use extends only to the limited information or items that are entitled to  
4 confidential treatment under the applicable legal principles, and it does not presumptively entitle  
5 parties to file confidential information under seal.

6

7 **2. "CONFIDENTIAL MATERIAL"**

8 "Confidential Material" shall include the following documents and tangible things  
9 produced or otherwise exchanged: including, but not limited to, corporate financials (and related  
10 documents), communications with customers, confidential communications<sup>1</sup>, intellectual  
11 property filings and disclosures to patent, copyright, and/or trademark attorneys or respective  
12 governmental authorities, customer lists, and sales documents<sup>2</sup>.

13

14 **3. SCOPE**

15 The protections conferred by this agreement cover not only Confidential Material (as  
16 defined above), but also (1) any information copied or extracted from Confidential Material; (2)  
17 all copies, excerpts, summaries, or compilations of Confidential Material; and (3) any testimony,  
18 conversations, or presentations by parties or their counsel that might reveal Confidential  
19 Material. However, the protections conferred by this agreement do not cover information that is  
20 in the public domain or becomes part of the public domain through trial or otherwise.

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23 <sup>1</sup> Shall be limited to internal communications related to: proprietary software, software code,  
product design, product research and development, algorithms; marketing surveys, sales techniques,  
customer lists; and, company financial information, company strategy.

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25 <sup>2</sup> Shall be limited to customer lists, internal evaluations and/or analysis of sales data, and any  
other personal identification information such as social security numbers, date of birth, and employer  
identification numbers.

1           **4. ACCESS TO AND USE OF CONFIDENTIAL MATERIAL**

2           4.1 Basic Principles. A receiving party may use Confidential Material that is  
3 disclosed or produced by another party or by a non-party in connection with this case only for  
4 prosecuting, defending, or attempting to settle this litigation. Confidential Material may be  
5 disclosed only to the categories of persons and under the conditions described in this agreement.  
6 Confidential Material must be stored and maintained by a receiving party at a location and in a  
7 secure manner that ensures that access is limited to the persons authorized under this agreement.

8           4.2 Disclosure of Information Constituting Confidential Material. Unless  
9 otherwise ordered by the court or permitted in writing by the designating party, a receiving party  
10 may disclose any confidential material only to:

11           (a) the receiving party's counsel of record in this action, as well as employees of  
12 counsel to whom it is reasonably necessary to disclose the information for this litigation;

13           (b) the officers, directors, and employees (including in-house counsel) of the  
14 receiving party to whom disclosure is reasonably necessary for this litigation, unless the parties  
15 agree that a particular document or material produced is for Attorney's Eyes Only and is so  
16 designated;

17           (c) experts and consultants to whom disclosure is reasonably necessary for this  
18 litigation and who have signed the "Acknowledgment and Agreement to Be Bound" (Exhibit A);

19           (d) the court, court personnel, and court reporters and their staff;

20           (e) copy or imaging services retained by counsel to assist in the duplication of  
21 Confidential Material, provided that counsel for the party retaining the copy or imaging service  
22 instructs the service not to disclose any Confidential Material to third parties and to immediately  
23 return all originals and copies of any Confidential Material;

24           (f) during their depositions, witnesses in the action to whom disclosure is  
25 reasonably necessary and who have signed the "Acknowledgment and Agreement to Be Bound"  
26 (Exhibit A), unless otherwise agreed by the designating party or ordered by the court. Pages of

1 transcribed deposition testimony or exhibits to depositions that reveal Confidential Material must  
2 be separately bound by the court reporter and may not be disclosed to anyone except as permitted  
3 under this agreement;

4 (g) the author or recipient of a document containing the information or a  
5 custodian or other person who otherwise possessed or knew the information.

6       4.3 Filing Confidential Material. Before filing Confidential Material or discussing  
7 or referencing Confidential Material in court filings, the filing party shall confer with the  
8 designating party to determine whether the designating party will remove the confidential  
9 designation, whether the document can be redacted, or whether a motion to seal or stipulation  
10 and proposed order is warranted. Local Civil Rule 5

11       (g) sets forth the procedures that must be followed and the standards that will be  
12 applied when a party seeks permission from the court to file material under seal.

13

14       **5. DESIGNATING PROTECTED MATERIAL**

15       5.1 Exercise of Restraint and Care in Designating Material for Protection. Each  
16 party or non-party that designates information or items for protection under this agreement must  
17 take care to limit any such designation to specific material that qualifies under the appropriate  
18 standards. The designating party must designate for protection only those parts of material,  
19 documents, items, or oral or written communications that qualify, so that other portions of the  
20 material, documents, items, or communications for which protection is not warranted are not  
21 swept unjustifiably within the ambit of this agreement.

22       Mass, indiscriminate, or routinized designations are prohibited. Designations that are  
23 shown to be clearly unjustified or that have been made for an improper purpose (e.g., to  
24 unnecessarily encumber or delay the case development process or to impose unnecessary  
25 expenses and burdens on other parties) expose the designating party to sanctions.

26

If it comes to a designating party's attention that information or items that it designated for protection do not qualify for protection, the designating party must promptly notify all other parties that it is withdrawing the mistaken designation.

5.2 Manner and Timing of Designations. Except as otherwise provided in this agreement (see, e.g., second paragraph of section 5.2(a) below), or as otherwise stipulated or ordered, disclosure or discovery material that qualifies for protection under this agreement must be clearly so designated before or when the material is disclosed or produced.

(a) Information in documentary form: (e.g., paper or electronic documents and deposition exhibits, but excluding transcripts of depositions or other pretrial or trial proceedings), the designating party must affix the word "CONFIDENTIAL" to each page that contains Confidential Material. If only a portion or portions of the material on a page qualifies for protection, the producing party also must clearly identify the protected portion(s) (e.g., by making appropriate markings in the margins).

(b) Testimony given in deposition or in other pretrial or trial proceedings: the parties must identify on the record, during the deposition, hearing, or other proceeding, all protected testimony, without prejudice to their right to so designate other testimony after reviewing the transcript. Any party or non-party may, within fifteen days after receiving a deposition transcript, designate portions of the transcript, or exhibits thereto, as confidential.

(c) Other tangible items: the producing party must affix in a prominent place on the exterior of the container or containers in which the information or item is stored the word "CONFIDENTIAL." If only a portion or portions of the information or item warrant protection, the producing party, to the extent practicable, shall identify the protected portion(s).

5.3 Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to designate qualified information or items does not, standing alone, waive the designating party's right to secure protection under this agreement for such material. Upon timely correction

1 of a designation, the receiving party must make reasonable efforts to ensure that the material is  
2 treated in accordance with the provisions of this agreement.

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4 **6. CHALLENGING CONFIDENTIALITY DESIGNATIONS**

5       6.1 Timing of Challenges. Any party or non-party may challenge a designation of  
6 confidentiality at any time. Unless a prompt challenge to a designating party's confidentiality  
7 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic  
8 burdens, or a significant disruption or delay of the litigation, a party does not waive its right to  
9 challenge a confidentiality designation by electing not to mount a challenge promptly after the  
10 original designation is disclosed.

11       6.2 Meet and Confer. The parties must make every attempt to resolve any dispute  
12 regarding confidential designations without court involvement. Any motion regarding  
13 confidential designations or for a protective order must include a certification, in the motion or in  
14 a declaration or affidavit, that the movant has engaged in a good faith meet and confer  
15 conference with other affected parties in an effort to resolve the dispute without court action. The  
16 certification must list the date, manner, and participants to the conference. A good faith effort to  
17 confer requires a face-to-face meeting or a telephone conference.

18       6.3 Judicial Intervention. If the parties cannot resolve a challenge without court  
19 intervention, the designating party may file and serve a motion to retain confidentiality under  
20 Local Civil Rule 7 (and in compliance with Local Civil Rule 5(g), if applicable). The burden of  
21 persuasion in any such motion shall be on the designating party. Frivolous challenges, and those  
22 made for an improper purpose (e.g., to harass or impose unnecessary expenses and burdens on  
23 other parties) may expose the challenging party to sanctions. All parties shall continue to  
24 maintain the material in question as confidential until the court rules on the challenge.

25       7. **PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN**  
26 **OTHER LITIGATION**

If a party is served with a subpoena or a court order issued in other litigation that compels disclosure of any information or items designated in this action as "CONFIDENTIAL," that party must:

(a) promptly notify the designating party in writing and include a copy of the subpoena or court order;

(b) promptly notify in writing the party who caused the subpoena or order to issue in the other litigation that some or all of the material covered by the subpoena or order is subject to this agreement. Such notification shall include a copy of this agreement; and

(c) cooperate with respect to all reasonable procedures sought to be pursued by the designating party whose confidential material may be affected.

## **8. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL**

If a receiving party learns that, by inadvertence or otherwise, it has disclosed confidential material to any person or in any circumstance not authorized under this agreement, the receiving party must immediately (a) notify in writing the designating party of the unauthorized disclosures, (b) use its best efforts to retrieve all unauthorized copies of the protected material, (c) inform the person or persons to whom unauthorized disclosures were made of all the terms of this agreement, and (d) request that such person or persons execute the "Acknowledgment and Agreement to Be Bound" that is attached hereto as Exhibit A.

## **9. INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE PROTECTED MATERIAL**

When a producing party gives notice to receiving parties that certain inadvertently produced material is subject to a claim of privilege or other protection, the obligations of the receiving parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This provision is not intended to modify whatever procedure may be established in an e-discovery

1 order or agreement that provides for production without prior privilege review. Parties shall  
2 confer on an appropriate non-waiver order under Fed. R. Evid. 502.

3

4 **10. NON-TERMINATION AND RETURN OF DOCUMENTS**

5 Within 60 days after the termination of this action, including all appeals, each receiving  
6 party must return all Confidential Material to the producing party, including all copies, extracts  
7 and summaries thereof. Alternatively, the parties may agree upon appropriate methods of  
8 destruction.

9 Notwithstanding this provision, counsel are entitled to retain one archival copy of all  
10 documents filed with the court, trial, deposition, and hearing transcripts, correspondence,  
11 deposition and trial exhibits, expert reports, attorney work product, and consultant and expert  
12 work product, even if such materials contain confidential material.

13 The confidentiality obligations imposed by this agreement shall remain in effect until a  
14 designating party agrees otherwise in writing or a court orders otherwise.

15

16 **IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.**

17 DATED: June 7<sup>th</sup>, 2016 \_\_\_\_\_ /s/J. Curtis Edmondson \_\_\_\_\_

18 Attorneys for Plaintiff  
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22 DATED: June 7<sup>th</sup> 2016 \_\_\_\_\_ /s/ Ana-Maria Popp \_\_\_\_\_

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DATED: June 7<sup>th</sup>, 2016

/s/ Gary C. Adler

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**PURSUANT TO STIPULATION, IT IS SO ORDERED.**

DATED: June 8, 2016

J. Richard Creature  
United States Magistrate Judge

## EXHIBIT A

## ACKNOWLEDMENT AND AGREEMENT TO BE BOUND

I, \_\_\_\_\_ [print or type full name], of \_\_\_\_\_  
[print or type full address], declare under penalty of perjury that I have read the Stipulated  
Protective Order in its entirety and understand that the contents and restrictions set forth herein  
was issued by the United States District Court for the Western District of Washington on [date]  
in the case of TOUCHPOINT COMMUNICATIONS, LLC v. DENTALFONE, LLC, Case No.  
3:15-cv-05240-JRC. I agree to comply with and to be bound by all the terms of this Stipulated  
Protective Order and I understand and acknowledge that failure to comply shall expose me to  
sanctions and punishment in the nature of contempt. I solemnly promise that I will not disclose  
in any manner any information or item that is subject to this Stipulated Protective Order to any  
person or entity except in strict compliance with the provisions of this Order.

I further agree to submit to the jurisdiction of the United States District Court for the Western District of Washington for the purpose of enforcing the terms of this Stipulated Protective Order, even if such enforcement proceedings occur after termination of this action.

Date:

City and State where sworn and signed: \_\_\_\_\_

Printed name: \_\_\_\_\_

Signature: \_\_\_\_\_